

# **California Special Education Management Information System CASEMIS**

## **CASEMIS Step By Step**



**For Basic Users**

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## **A NOTE ABOUT THE CASEMIS STEP BY STEP**

This document has been written for use by the local public education agencies (LEAs) and the state-operated programs (SOP) submitting data for students with disabilities in California. The LEAs include school districts, county offices of education, and special education local plan areas (SELPA). The SOPs include all participating programs for the disabled, operated by various state agencies.

This document is written to provide assistance to users of the CASEMIS software and provide step by step in its use. The CASEMIS Step by Step for Basic Users can be downloaded from the following website:

<http://www.cde.ca.gov/sp/se/ds/>

### **Contact Information**

The CDE provides free technical support to the LEAs as necessary. If you need assistance, have questions or inquiries for further information regarding the student level database or the CASEMIS software, please directed them to:

Mailing Address: California Department of Education  
Special Education Division  
1430 N Street, Suite 2401  
Sacramento, CA 95814  
Attn: Assessment, Evaluation, and Support Unit  
Telephone: 916-327-3651  
E-mail address: [casemis@cde.ca.gov](mailto:casemis@cde.ca.gov)  
Fax: 916-327-3730

## **CASEMIS SOFTWARE INSTALLATION**

### **General Software Information**

Locate the **C**alifornia **S**pecial **E**ducation **M**anagement **I**nformation **S**ystem (CASEMIS) executable file downloaded from the Internet. As the installation proceeds, the software will automatically default to the C: drive, unless it is directed to install elsewhere on the computer. The CASEMIS software has on-screen direction to assist through this process. Please follow the directions. The directions assume that the CASEMIS software is installed to the C: drive.

Before beginning,

- Contact your network administrator prior to installation to verify you have appropriate permission to install the software, and
  - Exit any software programs are currently running, only Microsoft Windows is active.
-

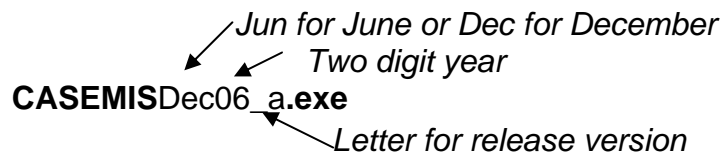
## Locating the Installation File


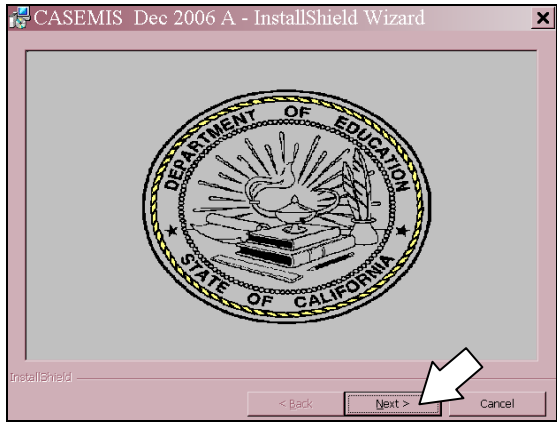

Locate the CASEMIS executable file from the Internet web page:

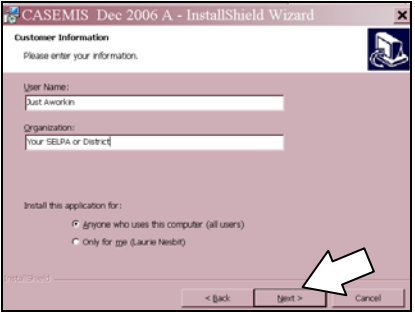
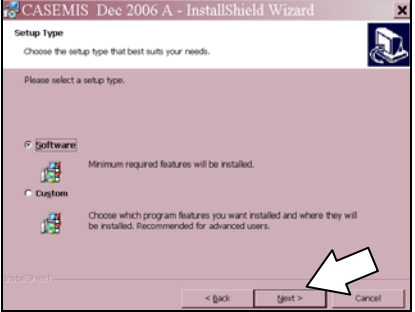
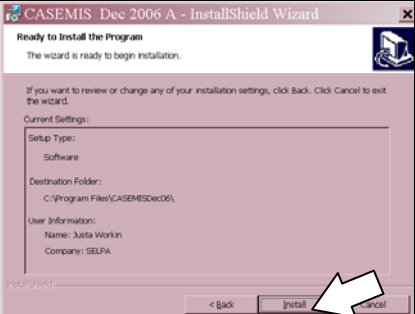
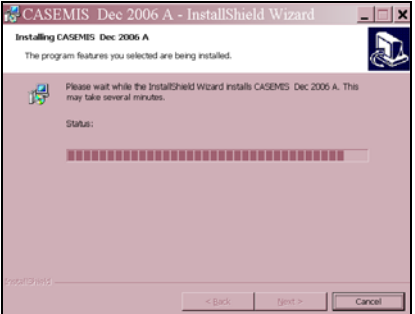

<http://www.cde.ca.gov/sp/se/ds/>

The installation file name changes with each release. The file name always:

- Begins with **CASEMIS**
- Followed by a “**Jun**” or a “**Dec**”(June or December cycle, respectively)
- Next is two digit-year, such as, “**06**”, for 2006
- Next is an underscore followed by a letter for the version, for example, “**\_a**” and it ends with the file extension “**.exe**”


  
**CASEMISDec06\_a.exe**

Action	What is on the screen
<p>Locate the CASEMISXXX##_x.exe file. The filename changes with each release. More than one version may be released in a cycle.</p> <p>Double click the <b>CASEMISXXX##_x.exe</b> file.</p>	
<p>Two separate message screens appear and then disappear.</p> <p>When the InstallShield Wizard screen appears click the <b>Next</b> button.</p>	
<p>Click the <b>Next</b> button.</p>	

Action	What is on the screen
<p>Type user's name and organization in the boxes provided.</p> <p>Click the <b>Next</b> button.</p>	
<p>Verify the software radio button is marked.</p> <p>Click the <b>Next</b> button.</p>	
<p>Click the <b>Install</b> button.</p>	
<p>Wait for the Status screen to disappear.</p>	
<p>Click the <b>Finish</b> button.</p>	

## THE PRELIMINARY INFORMATION

### File Format

The CASEMIS Technical Assistance Guide (TAG) contains detailed information about the database structure, codes, and other information that are not covered in this document. Make certain that you have ready access to an electronic or printed copy of the current CASEMIS TAG.

Before proceeding further, verify each of the following that apply to the data files as applicable:

- Make certain that the name of the data files (these will be referred to as tables) for reporting end with **.dbf** or **.txt** or **.csv**.
- The first record in a **.txt** or **.csv** file is considered a 'header' and will be read as a header of the file layout when CASEMIS performs the extraction routine. **Note: Failure to include the 'header' record, as the first entry in a .txt or .csv file will result in data file having a count of one less record reported.**
- The date format in a **.txt** or **.csv** file must be CCYYMMDD (i.e. 20070630). This is referred to as a year 2000 format. This is the same format for ALL date fields in these file formats.

Refer to [CASEMIS Table Contents](#) to determine if all of the required data tables are available. If any tables are missing, contact your local data manager before proceeding.

## CASEMIS Table Contents

Each reporting cycle requires, as a minimum the Student Data table, and Student Service table.

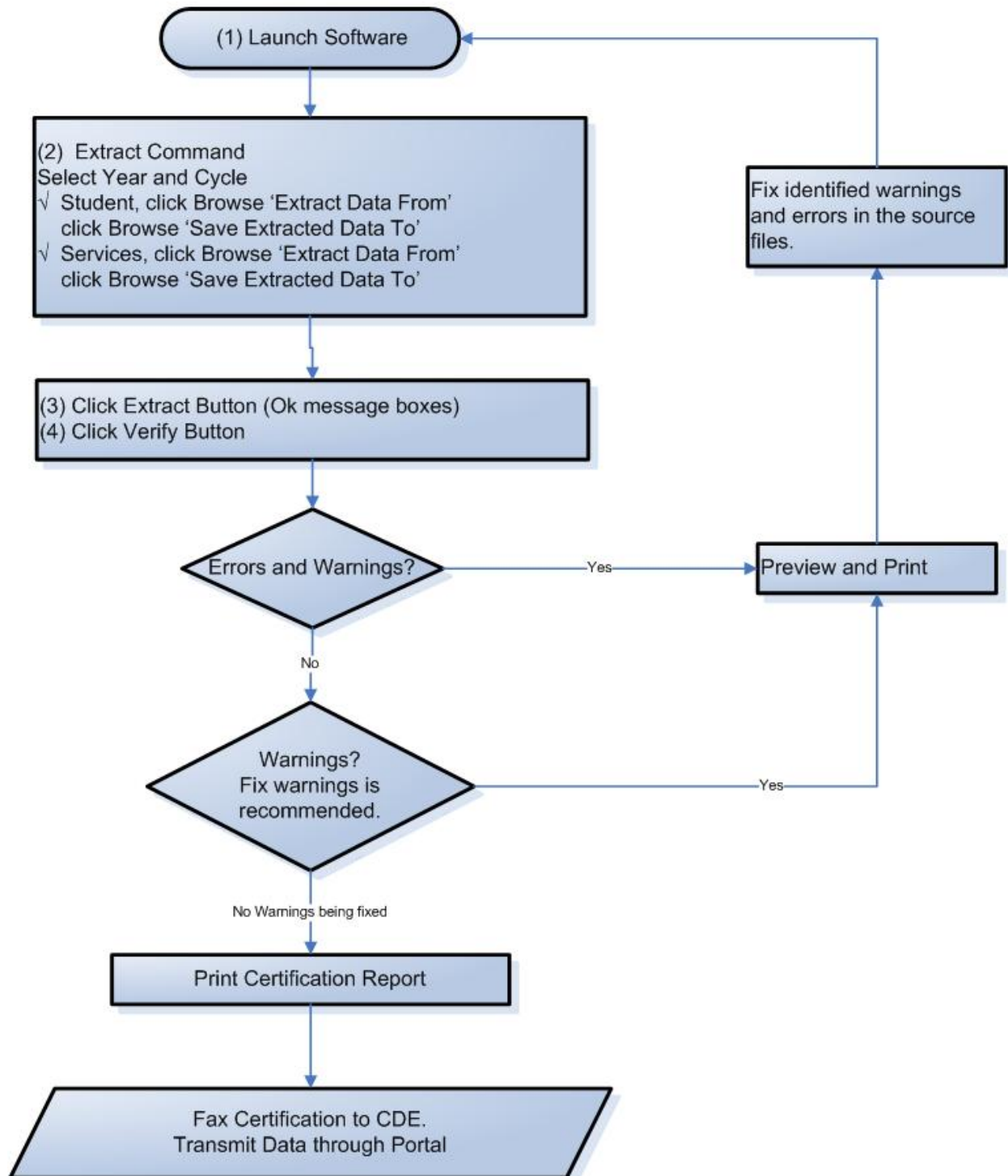
Data Table	When Required	Number of Records to Submit Refer to the CASEMIS TAG for detailed information
A - Student Data	All cycles	One record (Field A-1 through A-30, infant fields as necessary) for each child/student who received or was evaluated for special education/related services.
B - Student Services	All cycles	<b>At least one record for each student reported in Table A, except those students with a code 80 or 90 in Field A-26, PLAN_TYPE.</b> A record should be submitted for each service provided to the student. The STUDENT_ID and the SELPA_CODE must match in the Student Data and the Student Services data tables.
C - Discipline (Suspension/Expulsion)	End of Year cycle	One record for <u>each</u> disciplinary action a special education student received. For example, a special education student who received three disciplinary actions during the year will have a record submitted for each action. A total of three disciplinary records are to be submitted for that student.  <b>Note:</b> The CASEMIS data Verification phase requires the STUDENT_ID and the SELPA_CODE match in the both the Student Data and the Discipline data tables.
D - Post-secondary Follow-up	End of Year cycle	<b>One record for each student exited from program or SELPA during the prior year</b> except those students who returned to regular education (EXIT_RESON 70), transferred to another program (EXIT_RESON 76) or are deceased (EXIT_RESON 77) (2006-07, for end-of-year cycle reporting only). Post-secondary is generally considered as after high school; the June 2008 Table D would include any student who exiting high school during the 2006-07 school year or students 14 years of age and older.



## USING THE CASEMIS SOFTWARE

This flowchart depicts a high overview of the Data Extraction process.

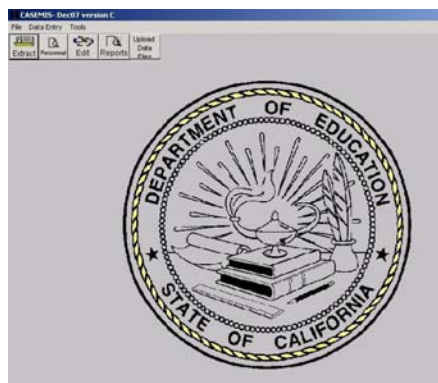
### Data Extraction Overview



## Main Menu Screen

This screen is referred to as the Main Menu. As you Exit or Close other screens, you will be returned to this screen.


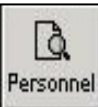



After launching the software there are several options available in the CASEMIS software. There are two ways to direct the software in what to do, **buttons and menu options**.



### Buttons - CASEMIS Software Main Menu Screen

CASEMIS Step By Step 04-02-2008 DRAFT




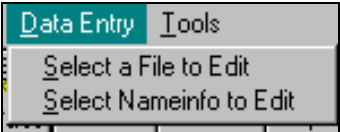

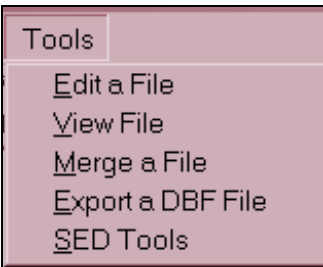


Buttons	Description of Features Activated
	<b>Extract</b> - Gathers student level data into a new file for data verification, certificate generation, problem identification and reports. Errors, Warnings, Duplicate students, and Unextracted Records are identified during the verification phase. This option requires that your files have the correct data structure. See the CASEMIS Technical Assistance Guide (TAG) for specific information about the data fields and codes.
	<b>Personnel</b> – Data regarding Personnel information can be entered for the required annual reporting cycle.
	<b>Edit</b> - Student level data fields are subjected to routine checks. Inconsistencies (if any) produce a list of errors and warnings. All errors must be corrected. Warnings must be reviewed prior to submitting the data to the Department of Education.
	<b>Reports</b> - Several reports are pre-programmed for your convenience.
	<b>Upload Data Files</b> – This utility is used to access the CDE internet portal to transmit your CASEMIS data files.



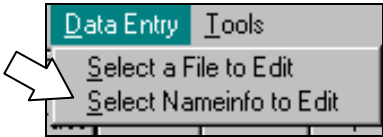

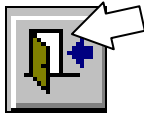
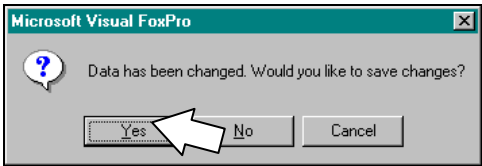
## Command Options – Main Menu Screen

**File Data Entry Tools**


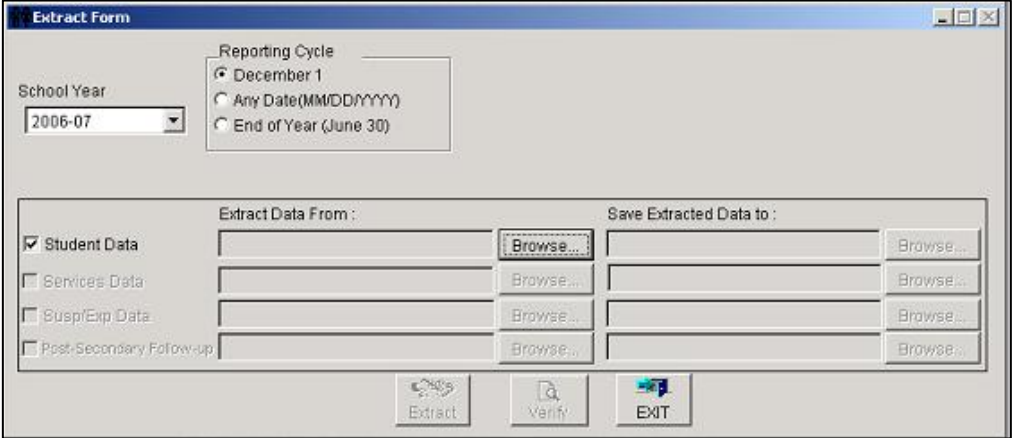
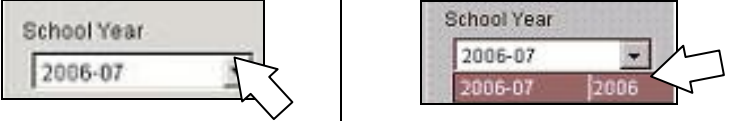
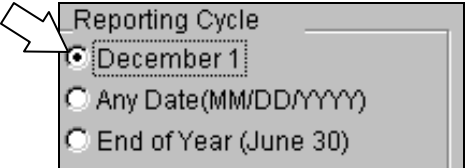
This toolbar is located in the upper left corner of the Main Menu window. These can be activated by a single left mouse button click. A vertical list of sub-menu options will display. Select the appropriate option by highlighting it with the mouse.


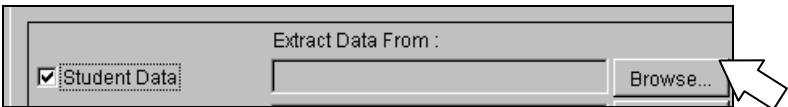
Option	Drop down Options	Action
		<b>Exit</b> the software.
		<p><b>Select a File to Edit</b> gives the user a way to change information located in a CASEMIS database file (.dbf).</p> <p><b>Select NameInfo to Edit</b> allows the user to correct the director's information on the software generated certification report.</p>
		<p><b>Edit a File</b> gives the user a way to <u>change information</u> in a CASEMIS database, text/ASCII file, or comma delimited files. These files names end with <b>.dbf</b>, <b>.txt</b>, or <b>.csv</b>.</p> <p><b>View a File</b> gives the user a way to <u>look at information</u> in a CASEMIS database, text/ASCII file, or comma delimited files.</p> <p><b>Merge a File</b> provides programming which will combine two files as a new third file.</p> <p><b>Export a DBF File</b> will send information from a database and create a new text or comma delimited file.</p> <p><b>SED Tools</b> is for State administrative purposes only.</p>

## STUDENT TABLES A-D

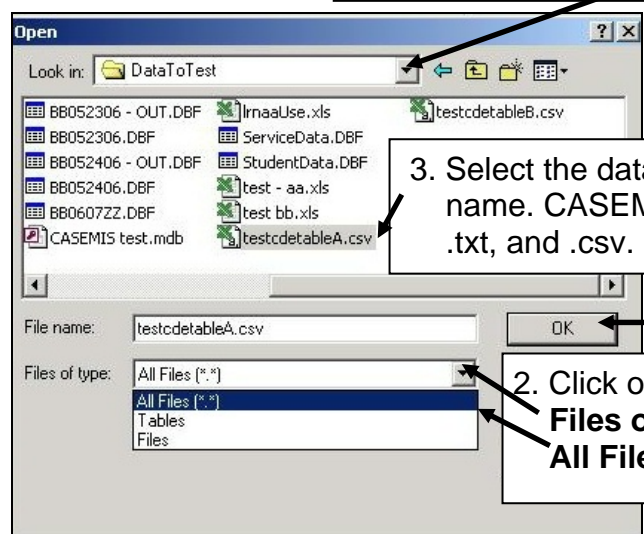
Inputting the Authorization Information in Tables A-D Certification Report	
Action	What is on the screen
Locate the Command Options.	
Click the <b>Data Entry</b> command option.	
Choose <b>Select NameInfo to Edit</b> from the drop down list.	
Type the correct information in the boxes.	
Click the <b>Exit</b> button.	
Click the <b>Yes</b> button to save the changes, <b>No</b> to abort the changes, or <b>Cancel</b> to return to the edit screen.	

## Tables A-D Data Extraction Process

Selecting the Reporting Cycle	
Action	What is on the screen
Click the <b>Extract</b> button, by depressing the left mouse button once and rapidly release.	
The Extract Form will appear.	
Click the down arrow. Select the <b>School Year</b> from the list that appears.	
Click the <b>Reporting Cycle</b> The center of the circle will darken indicating selection.	

Path to the Data	
Action	What is on the screen
Click <b>Student Data</b> . A checkmark will appear in the box.	
Click the <b>Browse...</b> button.	

1. Locate the data file using normal Windows conventions.

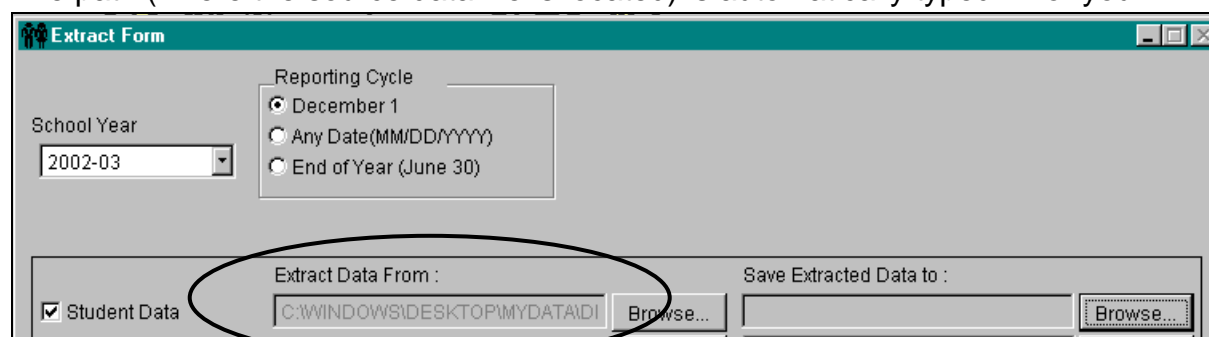


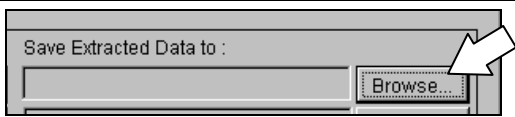
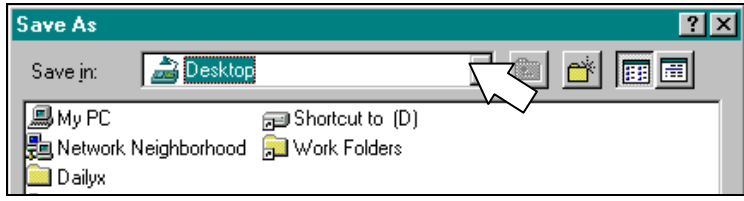
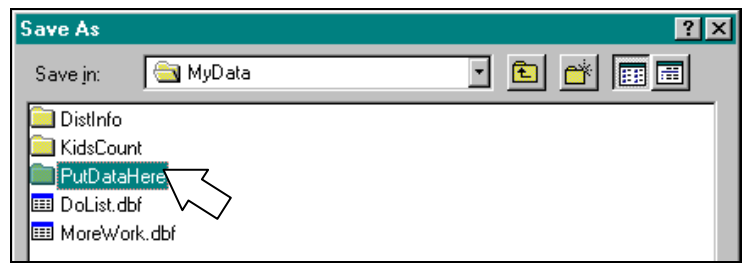
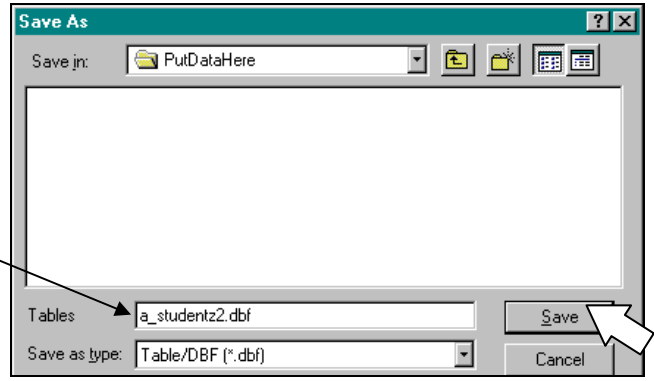
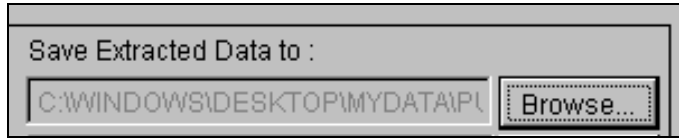
3. Select the data source file by double clicking on the file name. CASEMIS accepts only Files of type of .DBF, .txt, and .csv.

2. Click on drop down arrow for **Files of Type** and select **All Files (\*.\*)** from the list..

4. Click the **OK** button.

The path (where the source data file is located) is automatically typed in for you.



Choosing a Target or Destination Folder	
Action	What is on the screen
Click the <b>Browse...</b> button.	
Locate the target data folder (using normal Windows conventions) where you want to place the new data file.	
Select the target folder by double clicking.	
<div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;">           (Optional) You <i>should</i> give the file a different name at this time by editing the name in the Tables box. If an Alert message appears that the file already exists, follow the direction in the next section, <b>File Name Already Exists Alert</b>, before continuing.         </div> Click the <b>Save</b> button to complete the operation.	
The path is automatically typed in. Additional data choices will become available depending on the Reporting Cycle selected.	

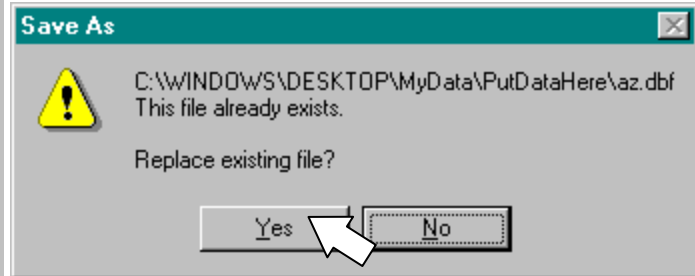


### File Name Already Exists Alert

If you have previously attempted to extract the data the following screen may appear. Click the **Yes** button to delete the file with the same name and replace it with the current file.

**OR**

Click the **No** button to return to the previous screen and type in a different file name.



### Services, Discipline (Susp/Exp), and Post-Secondary Follow-up Data

Repeat the steps listed in the **Path to the Data file** sections when submitting services, disciplinary (susp/exp), and post-secondary follow-up data. Check the appropriate box for the data being submitted, for example, for Services, check the Services Data box then choose the associated **Browse** button.

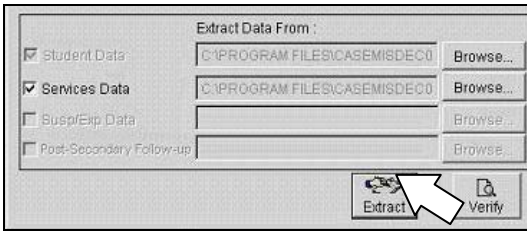



A form titled "Extract Data From : / Save Extracted Data to :". It has two columns. The left column is "Extract Data From :" and the right column is "Save Extracted Data to :". Each column has four rows corresponding to data types: Student Data, Services Data, Susp/Exp Data, and Post-Secondary Follow-up. Each row has a checkbox, a text field with a file path, and a "Browse..." button. In the "Services Data" row, the checkbox is checked, and the "Browse..." button in the "Save Extracted Data to :" column is highlighted with a black arrow.

After completing the **Path to the Data** section, proceed to the **Choosing a Target or Destination Folder** for each data file as appropriate. Use the associated Browse... buttons for each data file.

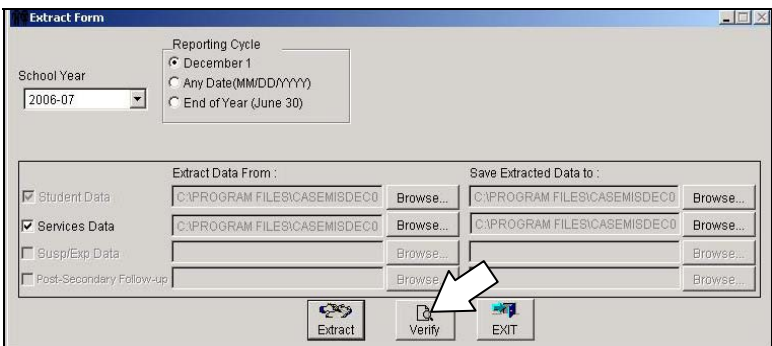
For example, for the December 1 reporting cycle two data files are submitted, Student Data and Services Data. The screen will appear similar to the figure below. Be sure to note where all of the extracted files are saved to and their names since these files will be accessed later.









A dialog box titled "Extract Form". It has a "School Year" dropdown menu set to "2006-07". To its right is a "Reporting Cycle" section with three radio buttons: "December 1" (selected), "Any Date(MM/DD/YYYY)", and "End of Year (June 30)". Below this is a table with two columns: "Extract Data From :" and "Save Extracted Data to :". It has four rows for data types: Student Data, Services Data, Susp/Exp Data, and Post-Secondary Follow-up. Each row has a checkbox, a text field with a file path, and a "Browse..." button. At the bottom of the dialog are three buttons: "Extract", "Verify", and "EXIT".



Executing the Extraction Command	
Action	What is on the screen
Click the <b>Extract</b> button at the bottom of the Extract form screen.	
Click the <b>OK</b> button. Verify that all records were extracted.  As mentioned earlier, if the source file is .csv or .txt files, the first record is used as the header in the file.	
Click the <b>OK</b> button to continue when you see the Extract Notification message.  In the December 1 cycle, <b>only plan type equals 10 or 20 will be extracted.</b> An Extract Notification box will appear when plan type is 80 or 90 or report date is other than December 1 or entry date is after December 1.  In the June 30 cycle, <b>all plan types will be extracted.</b>	
Click the <b>OK</b> button for each additional file designated for extraction as appropriate. Verify that all records were extracted each time.	





## Tables A-D Data Verification

Verify the Extracted Data	
Action	What is on the screen
Click the <b>Verify</b> button.	

Navigation in Print Preview Options	
<p>This reference information will assist you working with the verification phase results.</p> <p><b>NOTE:</b> When there are multiple reports checked, you will issue separate commands for each report.</p>	
Option	What happens
	<b>Print</b> sends the report(s) to the printer using normal Windows protocols.
	<p><b>Preview</b> – Displays an electronic image of the printed report(s). A floating navigation toolbar appears with this selection. Some tools may be dimmed and temporarily not available. For example, if you are viewing the report's first page,  and  are dimmed.</p>
	<p><b>Print Preview Toolbar and Individual Tool Usage</b> - The toolbar can be docked or moved as typical of Windows applications.</p> <div data-bbox="1003 722 1425 777" data-label="Image"> </div> <hr/> <div data-bbox="321 840 380 903" data-label="Image"> </div> <p>Show the first page of the report</p> <div data-bbox="321 915 380 978" data-label="Image"> </div> <p>Move backward one page</p> <div data-bbox="321 991 380 1054" data-label="Image"> </div> <p>GO TO PAGE. Type in the page number you wish to view and click the OK button.</p> <div data-bbox="1159 919 1425 1087" data-label="Image"> </div> <div data-bbox="321 1096 380 1159" data-label="Image"> </div> <p>Move forward to the next page.</p> <div data-bbox="321 1163 380 1226" data-label="Image"> </div> <p>Show the last page of the report.</p> <div data-bbox="321 1218 454 1281" data-label="Image"> </div> <p>Change the magnification level.</p> <div data-bbox="321 1289 396 1352" data-label="Image"> </div> <p>Exit preview.</p> <div data-bbox="321 1365 380 1428" data-label="Image"> </div> <p>Print the report.</p>
<p>After the selected reports are previewed, the data sent to the new file are the errors, warnings, duplicate students, and Unextracted records found during the verification process.</p> <p>For your convenience, the file can be created as a database, text document, or spreadsheet. These buttons are used to create such files, , , and .</p> <p>When the new file creation is completed, a 'Transfer Complete - press any key' message will appear in the upper right corner of the window. The screen will be frozen until a key is pressed to clear the message box off of the screen.</p>	
	Close/Exit the screen.

Verification Phase Results	
<b><u>File(s) ready for Certification</u></b>  A Print screen with Certification checked appears if data is complete and correct. Proceed in the next step, <a href="#">File(s) ready for Tables A-D Certification</a> .	<b><u>File(s) NOT available for Certification</u></b>  The associated boxes can be checked when the verification phase locates Errors, Warnings, Duplicates, or Unextracted Records. The checkmarks turn on and off (Toggling) by clicking the check boxes when lit.

In the previous section **Navigations in Print Preview Options**, buttons are explained.

Sample Verification Process Outcomes			
 <p>Errors, Warnings, Duplicates, and Unextracted Records were found. All four reports are highlighted. A report for each will be generated for each of the checked boxes. (Certification is dimmed and unavailable.)</p>	 <p>Errors only were found. One report will be generated. (Warnings, Duplicates, Certification, and Unextracted Records are dimmed and unavailable.)</p>	 <p>Warnings were found. Two reports will be generated. (Errors, Duplicates, and Unextracted Records are dimmed and unavailable.)</p>	 <p>Error, Warnings, Duplicates, and Unextracted Records were found. Four reports can be generated. <b>However</b>, in this example only the Unextracted Records report will display. Only one report is checked.</p>

How to Resolve Verification Results		
Verification Result	What is required	Does it prevent Certification?
Errors	Must be corrected	Yes
Warnings	Verify that data is correct	No
Duplicates	Must be corrected	Yes
Unextracted Records	Verify that data is correct	No

If the Certification report is checked and the warnings are verified, go to Section [File\(s\) Ready for Tables A-D Certification](#).

Controlling Verification Report(s)		
Action	What is on the screen	
Click the adjacent box. Each mouse click in the box will select or deselect the report. Active reports have the adjacent box checked, and inactive reports do not. Dimmed reports are not available and clicking them has no affect.	Uncheck boxes to deselect reports. Only checked (active) reports respond to the options given. <div><div><div><input checked="" type="checkbox"/> ERRORS61</div><div><input checked="" type="checkbox"/> WARNINGS9</div><div><input checked="" type="checkbox"/> DUPLICATES2</div><div><input checked="" type="checkbox"/> CERTIFICATION</div><div><input checked="" type="checkbox"/> UNEXTRACTED RECORDS2</div></div></div>	Deselected boxes will suspend report preview, print, and exports. In this example only the Errors Report is active. <div><div><div><input checked="" type="checkbox"/> ERRORS78</div><div><input type="checkbox"/> WARNINGS9</div><div><input type="checkbox"/> DUPLICATES2</div><div><input checked="" type="checkbox"/> CERTIFICATION</div><div><input type="checkbox"/> UNEXTRACTED RECORDS2</div></div></div>

## Using Table A-D Verification Reports

The associated boxes will be checked when the verification phase locates Errors, Warnings, Duplicates, or Unextracted Records.

First, review the magnitude and type of alerts by using the Preview button. Once the problems are reviewed, several options are available. Depending upon the circumstances, determine the correct action(s) to take.

You may select which of the available reports you wish to work with by checking or unchecking the adjacent box.



Three choices are available for correcting data.

Choice 1, is recommended if there are only a few errors that can be edited in the extracted database. Continue with these procedures.

Choice 2, notify your information technology staff who supplied the file or those who maintain the data files (make data entries) to correct the data and then give you the corrected file for processing.

Choice 3, edit the source file then extract and verify the revised file. Corrections to the data may be expedited through effective use of the reports. Printing out the errors will assist in the correcting data. When more than a few records with errors or warnings need to be corrected, the reports can be saved to .dbf, Text or Excel format.

## Sample Validation Error Report

Record	Student ID	Name	BirthDate	Error	Message
C:\PROGRAM FILES\CASEMIS\DECD6\PUTDATA\HERE\SERVICEDATA= OUT.DBF					
Selpa 0111					
District					
1	SLEEPYLAM	Serv: 210,	//	E201	NO STUDENT RECORD FOR SERVICES
1	SLEEPYLAM	Serv: 210,	//	E204	LOCATION CODE IS IN ERROR
1	SLEEPYLAM	Serv: 210,	//	E213	PROVIDER CODE IS IN ERROR

## Understanding the Report Contents

### Location of File needing correction.

The **SELPA/District** related to the error will assist in locating who to contact for correct information. Some problems will not list a SELPA / District, such as, when the Services file does not have a corresponding record in the Student Data file.

### Sample Services file

Record	Student ID	Name	BirthDate	Error	
C:\PROGRAM FILES\CASEMIS\DECODE\PUTDATAHERE\SERVICEDATA=C					
Selpa 0111					
District					
1	SLEEPYLAM	Serv: 210,	//	E201	NO STUD
1	SLEEPYLAM	Serv: 210,	//	E204	LOCAT
1	SLEEPYLAM	Serv: 210,	//	E213	PROVID

**Record number**, this is a sequential record number assigned to the student by the software. This feature allows quick navigation to specific records when making corrections.

Next to the record number is the Student ID provided by the SELPA/District.

Selpa 0111					
District					
1	SLEEPYLAM	Serv: 210,	//	E201	NO STUD
1	SLEEPYLAM	Serv: 210,	//	E204	LOCATION
1	SLEEPYLAM	Serv: 210,	//	E213	PROVIDE
1	SLEEPYLAM	Serv: 210,	//	E214	PROVIDE
District 0161150					
2	3342STUDID	Serv: 66 LIVY, OTTENBAUM	09/09/95	E202	SERVICE
2	3342STUDID	Serv: 66 LIVY, OTTENBAUM	09/09/95	E204	LOCATIO

Name	BirthDate	Error	Message
LITTLE, TYKE	10/16/02	E171	PARTICIP CODE IS IN ERROR
OP\MYDATA\PUTDATAHERE\B_INFERROR.DBF			
Infant Record, Error	//	E201	NO STUDENT RECORD FOR INFANT

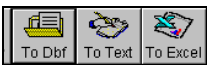
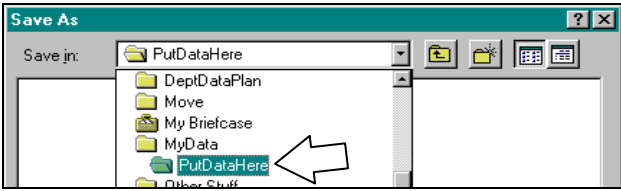


The Student's **Name** and **Birth Date** are listed for easy identification.


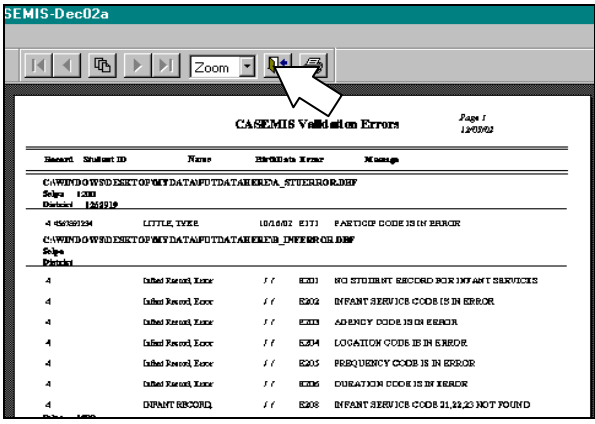
However, when a corresponding record in the Student Data file is missing, a message is substituted.


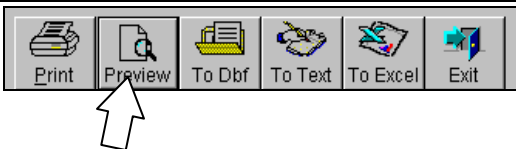
BirthDate	Error	Message
DATAHERE\A_STUERROR.DBF		
10/16/02	E171	PARTICIP CODE IS IN ERROR
DATAHERE\B_INFERROR.DBF		
//	E201	NO STUDENT RECORD FOR INFANT

Specific information is provided in the CASEMIS Technical Assistance Guide, Appendix B, for each error and warning code.



The brief explanation may assist in correcting the problem(s) encountered.

Exporting Errors, Warnings, Duplicates and Unextracted Record Reports	
Action	What is on screen
Click the desired record export format.	
Locate the target data folder (using normal Windows conventions) where the new data file will be exported.	
Double click the destination folder to select it as the target folder.	
Name the new file in the Tables box.	
Click the <b>Save</b> button.	
A message will appear that the export was completed. Press any key to acknowledge the confirmation.	

Previewing Errors, Warnings, Duplicates and Unextracted Reports	
Action	What is on screen
Click the <b>Preview</b> button.	
Review the report(s) for the types and magnitude of errors. An explanation of each navigation button was previously listed in the section <a href="#">Navigation in Print Preview Options</a> .	
If more than one report was checked on the display covered in the section <a href="#">Controlling Verification Report(s)</a> , each report will be previewed.	
Click the <b>Exit</b> button to close <u>each</u> report after reviewing it.	

Preview and Review Validation Issues	
Action	What is on screen
<p>Click the <b>Preview</b> button.</p> <p>Only checked report(s) will display.</p> 	

Review of seven Errors detected during the Validation Phase (sample scenario).

<p>In the CASEMIS Validation Errors report:</p> <ul style="list-style-type: none"><li>Seven errors are related to Services.</li><li>Two students' whose records have errors</li></ul> <p>If there is only one page to the report, the navigation buttons are dimmed.</p>	<table><tr><th colspan="6">CASEMIS Validation Errors</th></tr><tr><th>Record</th><th>Student ID</th><th>Name</th><th>BirthDate</th><th>Error</th><th>Message</th></tr><tr><td colspan="6">C:\DOCUMENTS AND SETTINGS\LNESBIT\DESKTOP\CASEMIS\TEST DATA\BB0607DELETE.DBF</td></tr><tr><td colspan="6">Selpa 0111</td></tr><tr><td colspan="6">District 0161150</td></tr><tr><td>1</td><td>3342STUDID</td><td>Serv: DOE, JOHN</td><td>03/30/88</td><td>E202</td><td>SERVICE CODE IS IN ERROR</td></tr><tr><td>1</td><td>3342STUDID</td><td>Serv: DOE, JOHN</td><td>03/30/88</td><td>E204</td><td>LOCATION CODE IS IN ERROR</td></tr><tr><td>2</td><td>BALL530A357</td><td>Serv: DOED, JANE</td><td>04/30/04</td><td>E202</td><td>SERVICE CODE IS IN ERROR</td></tr><tr><td>2</td><td>BALL530A357</td><td>Serv: DOED, JANE</td><td>04/30/04</td><td>E204</td><td>LOCATION CODE IS IN ERROR</td></tr><tr><td>2</td><td>BALL530A357</td><td>Serv: DOED, JANE</td><td>04/30/04</td><td>E209</td><td>FREQUENCY CODE FOR AGES 0</td></tr><tr><td>2</td><td>BALL530A357</td><td>Serv: DOED, JANE</td><td>04/30/04</td><td>E210</td><td>DURATION ERROR FOR AGES 0</td></tr><tr><td>2</td><td>BALL530A357</td><td>Serv: DOED, JANE</td><td>04/30/04</td><td>E214</td><td>PROVIDER ERROR FOR AGES 0</td></tr></table>	CASEMIS Validation Errors						Record	Student ID	Name	BirthDate	Error	Message	C:\DOCUMENTS AND SETTINGS\LNESBIT\DESKTOP\CASEMIS\TEST DATA\BB0607DELETE.DBF						Selpa 0111						District 0161150						1	3342STUDID	Serv: DOE, JOHN	03/30/88	E202	SERVICE CODE IS IN ERROR	1	3342STUDID	Serv: DOE, JOHN	03/30/88	E204	LOCATION CODE IS IN ERROR	2	BALL530A357	Serv: DOED, JANE	04/30/04	E202	SERVICE CODE IS IN ERROR	2	BALL530A357	Serv: DOED, JANE	04/30/04	E204	LOCATION CODE IS IN ERROR	2	BALL530A357	Serv: DOED, JANE	04/30/04	E209	FREQUENCY CODE FOR AGES 0	2	BALL530A357	Serv: DOED, JANE	04/30/04	E210	DURATION ERROR FOR AGES 0	2	BALL530A357	Serv: DOED, JANE	04/30/04	E214	PROVIDER ERROR FOR AGES 0
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2	BALL530A357	Serv: DOED, JANE	04/30/04	E214	PROVIDER ERROR FOR AGES 0																																																																				
<p>Click the <b>Exit</b> button to leave the CASEMIS Validation Errors report.</p>																																																																									
<p>In the CASEMIS Warnings report only one warning has been detected in the Validation Phase.</p>	<table><tr><th colspan="6">CASEMIS Warning</th></tr><tr><th>Record</th><th>Student ID</th><th>Name</th><th>BirthDate</th><th>Error</th><th>Message</th></tr><tr><td colspan="6">C:\DOCUMENTS AND SETTINGS\LNESBIT\DESKTOP\CASEMIS\TEST DATA\AA_Selpa 0111</td></tr><tr><td colspan="6">District 0161150</td></tr><tr><td>1</td><td>3342STUDID</td><td>DOE, JOHN</td><td>03/30/88</td><td>W909</td><td>LAST_IEP DAT</td></tr></table>	CASEMIS Warning						Record	Student ID	Name	BirthDate	Error	Message	C:\DOCUMENTS AND SETTINGS\LNESBIT\DESKTOP\CASEMIS\TEST DATA\AA_Selpa 0111						District 0161150						1	3342STUDID	DOE, JOHN	03/30/88	W909	LAST_IEP DAT																																										
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Record	Student ID	Name	BirthDate	Error	Message																																																																				
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District 0161150																																																																									
1	3342STUDID	DOE, JOHN	03/30/88	W909	LAST_IEP DAT																																																																				
<p>Click the <b>Exit</b> button to leave the CASEMIS Warnings report.</p>																																																																									



## Tables A-D On-line Corrections to an Extracted File

Files with few errors and warnings can be easily corrected on-line. Follow the directives dictated by your situation, as appropriate.

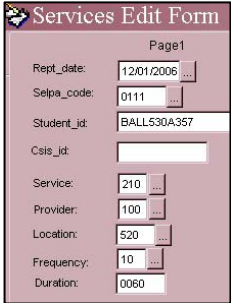
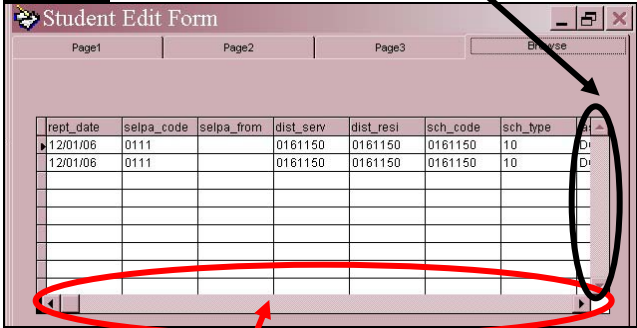
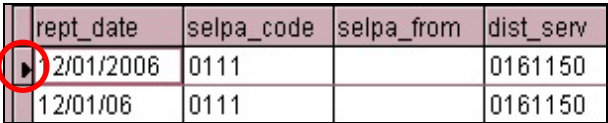




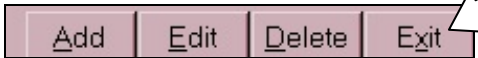
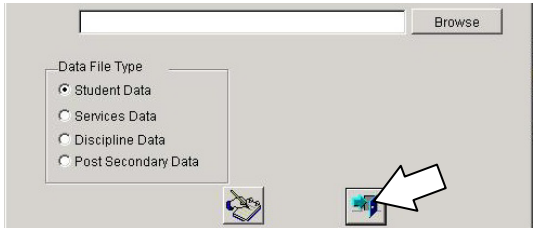


Fix Errors / Warnings Using the Edit Button located on the Main Menu screen

### Select, Locate, and Editing Data File

Action	What is on screen
<p>Select the source file data type, which the error comes from. Only the Student and Services Data options are available during the December 1 cycle.</p> <p>Editing for Table 3 Discipline (Suspension/Expulsion) and Table 4 Post-secondary Follow-up will be available for the End-of Year data collection cycle.</p>	
Click <b>Browse</b> to locate the file.	
<p>The software will permit errors to be corrected on the extracted file created at the beginning of this documentation.</p> <p><u>Locate</u> and <u>Select</u> the verified data file (.dbf) using normal Windows conventions.</p> <p>Click the <b>OK</b> button. Click the <b>Edit</b> button.</p>	
<p>If the structure of file selected through Browse and the selected Data File Type do not match, an alert message regarding the structure mismatch will appear. Check the Data File Type and the selected file for the error.</p>	



Action	What is on screen
<p>Tabs at the top of the screen, Page1, Page2, Page3 allow viewing/editing of data for individual records, except for the last tab, Browse.</p> 	<p>The last tab (furthest to the right) displays multiple records in columns. To view more records use the vertical scroll bar</p>  <p>Use the horizontal scroll bar to view more fields.</p>
<p><b>NOTE:</b> When working on the multiple record view, a small arrow in the left column points to the active record.</p>	
<p>Click <b>Edit</b>, located at the bottom right side of the Edit Form. Make the correction to the record/row as appropriate.</p> <p>The options at the bottom of the screen immediately change. Refer to the following section, <a href="#">Edit Data Screens - Record Navigation</a>.</p>	 <p><b>ADD</b> The ADD button permits the creation of a new record in the data table.</p>  <p>These buttons remove (delete) the record from the data table.</p>
<p>Click <b>Save</b> to accept the changes. The 'Revert' button cancels any changes made. Save or Revert must be clicked for other options to become available.</p>	
<p>Click the <b>Exit</b> button, when edits are complete.</p>	 <p>OR</p> 
<p>Click the <b>Exit</b> button.</p>	

## Edit Data Screens – Record Navigation






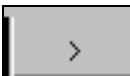



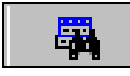





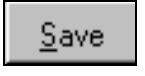

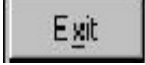

**Record Navigation** facilitates record location for review or correction. Moving from one record to another can be accomplished two methods, **Recno** or **Button Navigation**. This will assist in data review and correction and is available on all data type screens.

Moving through the Student Data table records can be incremental using **Recno**,



This feature is located in the lower right corner of each screen. Up and down arrows moves through records in the indicated direction one at a time.

Record Navigation toolbars have several Button features and are located on each screen. Click the appropriate navigation button located at the bottom of the screen. The record number currently displayed can be identified by looking at the **Recno** box located in the lower right side of the screen.

Buttons		Action
		Moves to the first record in that data file.
		Moves to the previous record that is, one record backward for that data file.
		Moves to the next record, forward one record with each click of the NEXT button.
		Moves to the last record for that data file.
		The search screen is activated to locate the data file for records that meet the criteria entered. See the following section, <b>Find Data Feature</b> , for more details.
		Creates a new record in the data file.
		Activates the record so corrections can be made.
		Erases the chosen record from the data file. A confirmation will appear prior to the actual record deletion.
		
		Keeps the changes made to a record and end the record edit session.
		Cancels the changes made to a record and end the record edit session.
		Closes the window and returns to Edit a DBF selection screen.

## Find Data Feature


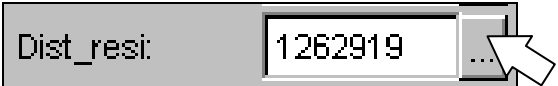
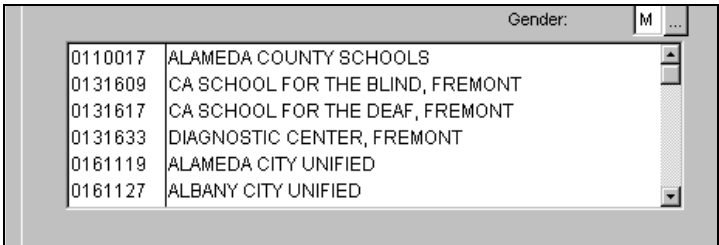
Record review and correction can be greatly enhanced by using the Find Feature. This feature searches and locates the various data types such as text, numbers, and dates. It locates specified value(s) that are in the selected field(s) and displays the records meeting the specified criteria. To display all records again in the data file, the "All" button must be clicked.

Action	What is on screen																								
Click <b>Find</b> located in the Edit Data toolbar.	<div><div>Top</div><div>Prev</div><div>Next</div><div>Bottom</div><div>Find</div></div>																								
A Search window will appear.	<div><div>Search</div><div>Field: REPT_DATEOperator: equalsValue: </div><div><input type="radio"/> And<input type="radio"/> Or<input type="checkbox"/> Case Sensitive</div></div>																								
Select the <b>Field</b> and <b>Operator</b> using the drop down list arrows, or the keyboard arrow keys to browse and select.	<div><div>Field: GRADE</div><div>Operator: equals equals not equals more than</div></div>																								
Enter the criteria in the Value box.  For example, a searching for the students in the 5 <sup>th</sup> grade	<div><div>Field: GRADEOperator: equalsValue: 05</div><div>Note: GRADE values are two digits using the single digit "5" can produce erroneous results.</div></div>																								
Simultaneous find requests with two different criteria can be made and then search through all records at once. For example, you may search for GRADE and SCH_CODE.	<div><div><input checked="" type="radio"/> And<input type="radio"/> Or</div><div>AND both criteria for each must match to be included in the found set. OR If either of the two criteria are found in a record it will be included in the found set.</div></div>																								
The Case Sensitive option forces an exact match of the uppercase and lowercase letters.	<div><input type="checkbox"/> Case Sensitive</div>																								
<div>Search</div>	Launches the Search for the records meeting the specified criteria.																								
<div>Cancel</div>	Cancels the Search and returns to the Edit form.																								
<div>All</div>	Finds all records in the data file.																								
ONLY records matching the entered criteria will display on screen being viewed when the Find button was clicked. A message appears when no records match the criteria entered.	<table><tr><th>rept_date</th><th>selpa_code</th><th>selpa_from</th><th>dist_serv</th><th>dist_resi</th><th>sch_code</th></tr><tr><td>12/01/02</td><td>1200</td><td></td><td>1262919</td><td>1262919</td><td>6008015</td></tr><tr><td>12/01/02</td><td>1200</td><td></td><td>1262935</td><td>1262935</td><td>6008031</td></tr><tr><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>	rept_date	selpa_code	selpa_from	dist_serv	dist_resi	sch_code	12/01/02	1200		1262919	1262919	6008015	12/01/02	1200		1262935	1262935	6008031						
rept_date	selpa_code	selpa_from	dist_serv	dist_resi	sch_code																				
12/01/02	1200		1262919	1262919	6008015																				
12/01/02	1200		1262935	1262935	6008031																				



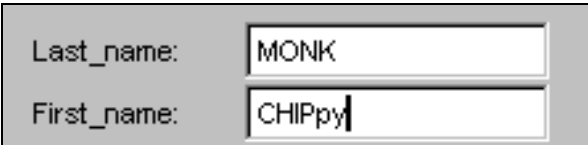
## Correcting Data



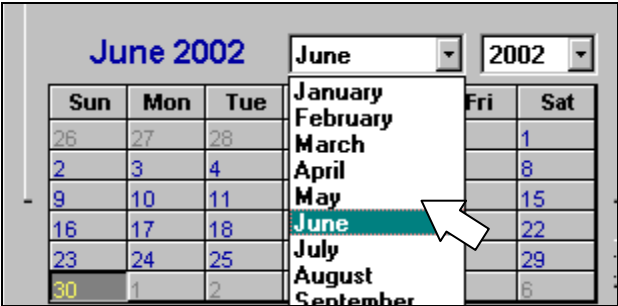


The three methods for editing data: drop down lists, free entry and dates.

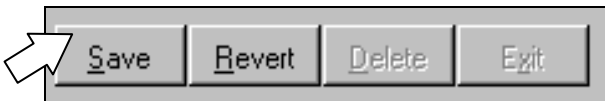
### Correcting Data – Drop Down Lists

Action	What is on screen
Click the <b>view list button</b> , directly adjacent to the field to be changed.	 <p style="text-align: center;"><b>OR</b></p> 
<b>Select</b> from the generated drop down list.	

### Correcting Data – Free Entry

Action	What is on your screen
Click into the <b>field</b> to be changed.	
Click <b>Edit</b> located at the bottom of the window.	
Edit the <b>field(s)</b> as needed.	

Correcting Data – Date Fields	
Action	What is on screen
Click the <b>view list button</b> , directly adjacent to the date to be changed.	
A Pop-Up calendar will appear showing the current data entered in the field.	
If necessary, Click the <b>down arrow</b> to correct the month. Choose the month with a single click on the correct month name.	
If necessary, Click the <b>down arrow</b> to correct the year. Choose the month with a single click on the correct year.	
Select <b>date</b> with a single click on the correct numeral.  The Pop-Up calendar will disappear from view and the selected date entered into the field.	

Saving the Editing Data	
Action	What is on screen
Click <b>Save</b> to accept or <b>Revert</b> , to discard the edits.	

After corrections are completed, extract and verify the data as previously outlined.  
**Tables A-D Certification Report**

Files Ready for Certification	
Action	What is on screen
Click the <b>Preview</b> button.	
Review the Certification Report for accurate information including authorization and number of records processed. Change the magnification as needed.	<div> <div> <h3>Sample Certification Report</h3> </div> <div> <h3>A Magnification option</h3> <p>(Zoom) is available as a drop down list.</p> </div> </div>

Missing or incorrect Authorization information? Refer to [Inputting the Authorization Information in Table A-D Certification Report.](#)

Part of the Certification Report includes the Special Education Annual Data Comparison Reports. A comparison is made of prior year statistics with the current reporting year's statistics. Any anomalies identified by the CASEMIS software are circled in the report. The SELPA is required to notify SED in writing for each anomaly why a major shift has occurred in the student population in addition to the required report.

Disability													
	MR	HH	DEAF	SLI	VI	ED	OI	OHI	SLD	DB	MD	AUT	TBI
Da2002	41	9	1	288	32	36	17	22	375	0	2	20	2
Da2003	48	11	0	294	32	34	17	31	358	0	2	28	4
Da2004	50	9	1	299	26	35	15	39	329	0	1	30	2
Da2005	48	9	1	313	27	38	13	53	310	1	1	42	1
Da2006	44	10	1	312	19	41	13	64	301	2	1	50	1
Da2007	39	15	1	315	26	46	13	67	280	1	1	53	2
Da2008	2	0	0	0	0	0	0	0	0	0	0	0	0
	-37	-15	-1	-315	-26	-46	-13	-67	-280	-1	-1	-53	-2
%	-94.87	***	**	***	**	***	**	***	**	***	**	***	**


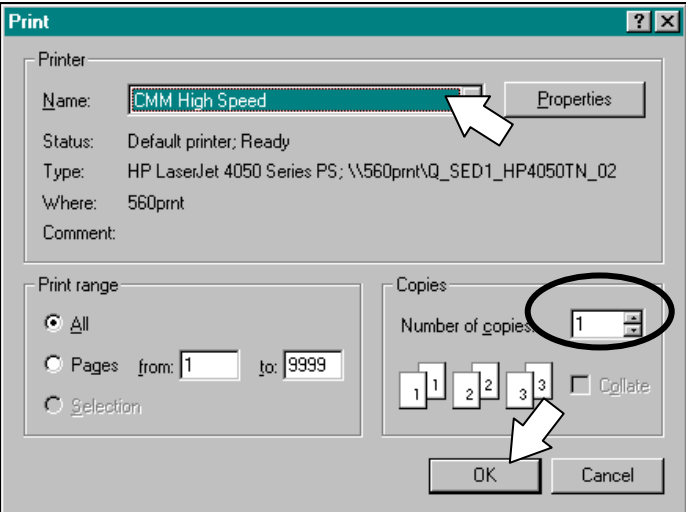
Disability													
	MR	HH	DEAF	SLI	VI	ED	OI	OHI	SLD	DB	MD	AUT	TBI
Da2002	310	68	25	1,524	58	348	131	140	2,838	0	11	181	13
Da2003	330	68	21	1,498	67	227	117	180	2,745	1	9	202	17
Da2004	384	57	26	1,315	58	277	127	217	2,601	1	10	229	18
Da2005	401	54	23	1,497	58	248	121	222	2,480	2	7	274	19
Da2006	424	87	22	1,431	55	250	126	231	2,350	5	7	289	20
Da2007	413	88	20	1,458	57	276	136	238	2,219	2	8	369	19
Da2008	2	0	0	0	0	0	0	0	0	0	0	0	0
	-18	-88	-20	-1,489	-57	-228	-125	-220	-2219	-2	-8	-369	-19
%	-98.31	***	**	***	**	***	**	***	**	***	**	***	**


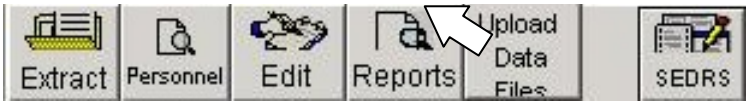
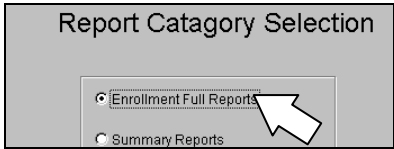

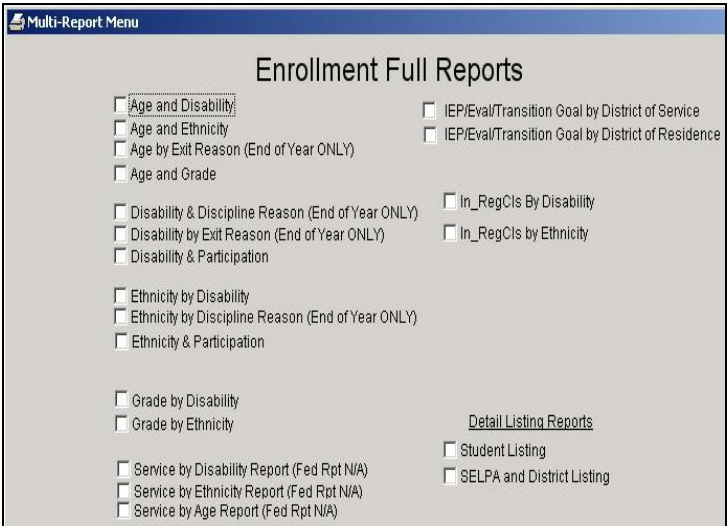


Disability													
	MR	HH	DEAF	SLI	VI	ED	OI	OHI	SLD	DB	MD	AUT	TBI
Da2002	61	292	95	1,644	1,065	2,011							
Da2003	35	238	94	1,882	1,055	1,882							
Da2004	61	363	85	1,090	1,003	1,004							
Da2005	83	287	83	1,052	1,017	1,060							
Da2006	67	279	84	216	1,055	1,129							
Da2007	64	361	93	205	2,011	1,104							
Da2008	0	0	0	2	0	0							
	-64	-361	-90	-283	-2011	-1104							
%	***	***	***	***	***	***							

Disability													
	MR	HH	DEAF	SLI	VI	ED	OI	OHI	SLD	DB	MD	AUT	TBI
Da2002	18	348	330	331	398	423	447	448	448	419	403	382	354
Da2003	18	338	185	300	411	444	452	463	424	461	416	409	413
Da2004	13	362	163	302	351	468	488	465	454	459	461	382	367
Da2005	12	339	213	316	354	392	471	457	415	458	398	403	418
Da2006	24	324	312	310	372	387	424	469	476	393	409	363	416
Da2007	26	368	211	301	388	421	435	431	420	363	361	383	378
Da2008	1	0	0	0	0	0	0	0	0	1	0	0	0
	-17	-368	-211	-301	-388	-421	-435	-431	-420	-363	-361	-383	-378
%	***	***	***	***	***	***	***	***	***	***	***	***	***

Print the File Certification Report	
Action	What is on screen
<p>Verify the CERTIFICATION box is checked then,</p> <p>click the <b>Print</b> button located at the bottom of the screen</p>	
<p>Select the printer and number of copies (using normal Windows conventions) if needed.</p> <p>Click the <b>OK</b> button.</p>	
<p>A CASEMIS Certification Report <u>must</u> be signed by the SELPA director (or other authorized agent) and faxed to the Special Education Division (SED) the same day the files are sent. The received files can be processed by the SED <b>if</b> a signed certification report is also received. <b>Fax the Certification Report to 916-327-3730.</b> A separate memo of explanation <u>must</u> be also sent when anomalies were identified by CASEMIS.</p> <p>Please contact your SELPA director for due dates and check for updates on the listserv. Regularly, CDE send updates of SELPA usable file received. Please retain the original CASEMIS File Certification Report and any memo of explanation in the event these were not received by CDE.</p> <p>The next step is to Upload the data files to the CDE secured website. The reference for this information is in the <a href="#">Instructions for the Secure Data Submission</a> section.</p>	

## Tables A-D Data Reports

Report Selection	
	
<b>Action</b>	<b>What is on screen</b>
Click the <b>Reports</b> button.	
<b>Select</b> the report category desired.	
<p>Depending on the Report Category Selected one of these two Multi-Report Menus will appear.</p>	
	
Select the <b>desired report(s)</b> by clicking the report name or the checkbox (directly in front of the report name).	
Click the <b>SELECT</b> button	



## Report Data Source Selection

The Summary and Enrollment Full Reports information selection screens are almost identical.

Action	What is on screen
<p>Click the <b>Reporting Cycle</b> (adjacent circle to the cycle)</p> <p>Click the <b>down arrow</b>.</p> <p>Select the <b>School Year</b> from the drop down list that appears</p>	
<p>Click <b>Browse</b> to locate the Student Data file.</p>	<p>Only one data selection box will appear, unless a report was chosen.</p>
<p>Locate the data file using normal Windows conventions.</p> <p>Double click the <b>file name</b> to select the source file. (This file must be in a .dbf format.)</p> <p>Click <b>OK</b></p>	

## Aggregation Level Selection

The Summary and Enrollment Full Reports aggregation (summaries) are similar. Click the **Reporting Level** (adjacent circle to the aggregation level)

A **Summary** report may be aggregated or totaled at one of three levels.

Selecting the State Level of Aggregation

provides additional

Subtotals at the chosen level.

An **Enrollment Full Report** may be aggregated at one of the five levels.

## Customizing Reports Through Data Selection


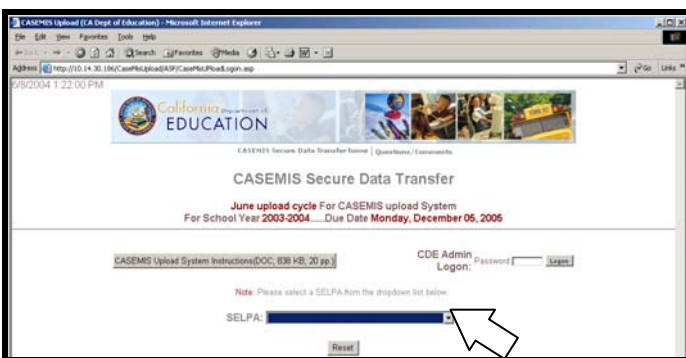
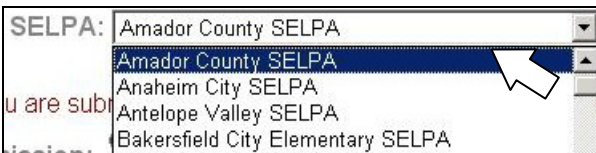
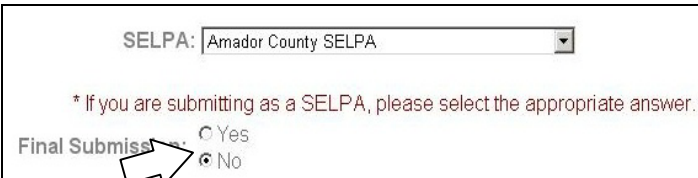
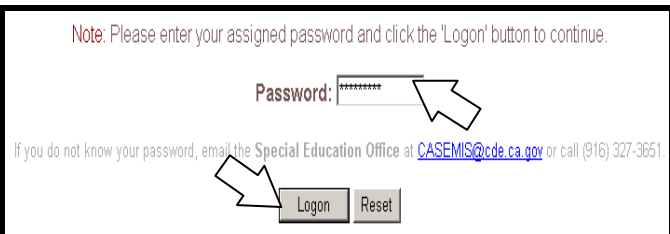
Automated reports can be tailored to your specific needs. The reports provide a choice of “All” or “Select.” The automatic or default report is for “All” data available. However, choosing “Select” will display a screen that lists of information that is available. Selecting search criteria narrows the content of report by focusing on the specific data.

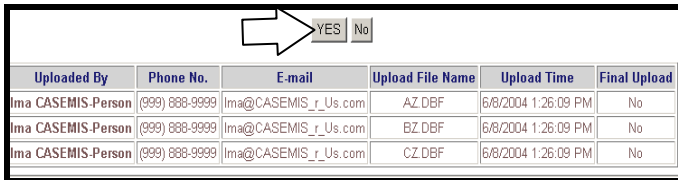
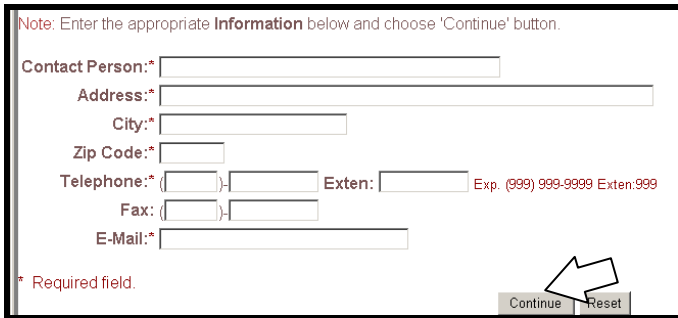
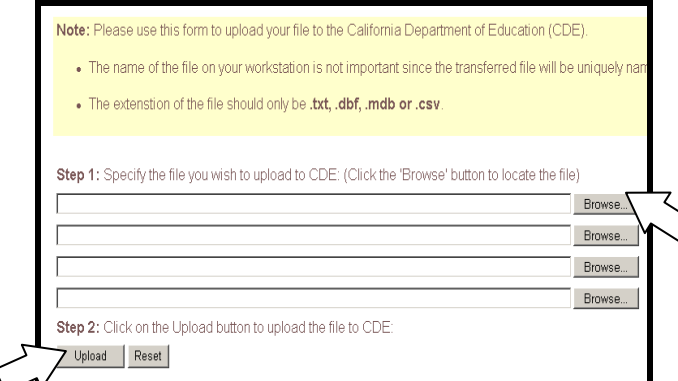
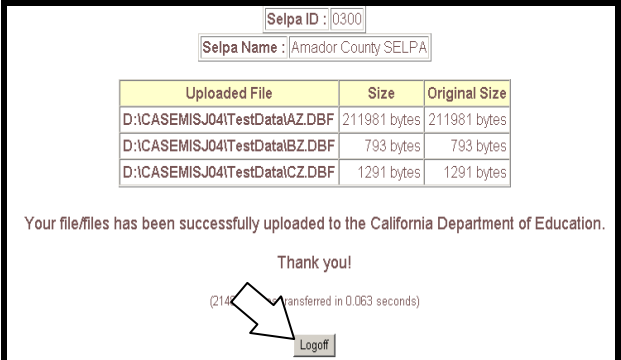
Action	What is on screen
Determine the data for inclusion in the report(s). Multiple selections may be made.  Click the <b>circle</b> in the Select column to the right of your choice.	
Highlight the <b>criteria</b> .	
Click the <b>Move</b> button. More than one criteria or item may be selected from the list.	
The selected choice(s) are listed in the right column and may be edited.  If necessary, highlight any item on the right column to be removed. Click the <b>Remove</b> from list button.	
<b>Click OK</b> , to use the criteria or click <b>Cancel</b> to discard the criteria.	

## Secure Data Submission

### Instructions for the Secure Data Submission

These instructions are for users of the CASEMIS software to securely upload their data to CDE. The computer **MUST** have access to the Internet for this option to be functional. We highly recommend the use of Microsoft Internet Explorer v6.x or later to complete this transmission, as the CDE does not support any other type of Internet browser.

Logon to Secured Data Transfer Site	
Action	What is on screen
Select the <b>Upload Data Files</b> button in the CASEMIS software.	
<p>This is the CDE CASEMIS Secure Data Transfer site (portal).</p> <p>Click on the SELPA dropdown arrow to display the SELPA list.</p>	
Select the SELPA for submission.	
<p>This area indicates whether the data submission is final or not. CDE <b>strongly</b> recommends selecting '<b>No</b>' since this will keep the portal open for future data submission if needed.</p> <p>If the Final Submission is marked "Yes", future data submissions are <b>NOT</b> possible until CASEMIS personnel re-opens the portal for your LEA. Call (916) 327-3651 and speak with CASEMIS personnel to request re-opening of the portal for your LEA.</p>	
<p>Enter the password obtained from the SELPA/CASEMIS contact personnel.</p> <p>Click the <b>Logon</b> button.</p>	




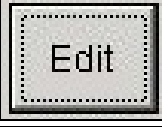





Upload Data Files to Secured Data Transfer Site																									
Action	What is on screen																								
<p>When data submissions were previously uploaded, a screen similar to this will display.</p> <p>Click the <b>Yes</b> button to send files to CDE.</p>	 <p>The screenshot shows a confirmation screen with a table of uploaded files. At the top, there are 'YES' and 'No' buttons with an arrow pointing to 'YES'. The table has columns: Uploaded By, Phone No., E-mail, Upload File Name, Upload Time, and Final Upload.</p> <table><tr><th>Uploaded By</th><th>Phone No.</th><th>E-mail</th><th>Upload File Name</th><th>Upload Time</th><th>Final Upload</th></tr><tr><td>Ima CASEMIS Person</td><td>(999) 888-9999</td><td>Ima@CASEMIS_r_Us.com</td><td>AZ.DBF</td><td>6/8/2004 1:26:09 PM</td><td>No</td></tr><tr><td>Ima CASEMIS Person</td><td>(999) 888-9999</td><td>Ima@CASEMIS_r_Us.com</td><td>BZ.DBF</td><td>6/8/2004 1:26:09 PM</td><td>No</td></tr><tr><td>Ima CASEMIS Person</td><td>(999) 888-9999</td><td>Ima@CASEMIS_r_Us.com</td><td>CZ.DBF</td><td>6/8/2004 1:26:09 PM</td><td>No</td></tr></table>	Uploaded By	Phone No.	E-mail	Upload File Name	Upload Time	Final Upload	Ima CASEMIS Person	(999) 888-9999	Ima@CASEMIS_r_Us.com	AZ.DBF	6/8/2004 1:26:09 PM	No	Ima CASEMIS Person	(999) 888-9999	Ima@CASEMIS_r_Us.com	BZ.DBF	6/8/2004 1:26:09 PM	No	Ima CASEMIS Person	(999) 888-9999	Ima@CASEMIS_r_Us.com	CZ.DBF	6/8/2004 1:26:09 PM	No
Uploaded By	Phone No.	E-mail	Upload File Name	Upload Time	Final Upload																				
Ima CASEMIS Person	(999) 888-9999	Ima@CASEMIS_r_Us.com	AZ.DBF	6/8/2004 1:26:09 PM	No																				
Ima CASEMIS Person	(999) 888-9999	Ima@CASEMIS_r_Us.com	BZ.DBF	6/8/2004 1:26:09 PM	No																				
Ima CASEMIS Person	(999) 888-9999	Ima@CASEMIS_r_Us.com	CZ.DBF	6/8/2004 1:26:09 PM	No																				
<p><b>Complete all entries</b> that have a red asterisk. (If data files were previously uploaded, the screen will information already filled out, modify information is necessary.)</p> <p>Press the <b>Continue</b> button.</p>	 <p>The screenshot shows a contact information form. A note at the top says: 'Note: Enter the appropriate Information below and choose 'Continue' button.' The form has fields for Contact Person, Address, City, Zip Code, Telephone, Exten, Exp, Fax, and E-Mail. Asterisks indicate required fields. At the bottom right, there are 'Continue' and 'Reset' buttons with an arrow pointing to 'Continue'.</p>																								
<p>Use the <b>Browse</b> button, select each file you are submitting. Only submit file types of <b>.txt, .dbf, .csv, or .zip</b>.</p> <p>Locate and select the appropriate files <b>in the CASEMIS folder</b>. (These files will be extracted and verified.)</p> <p>Press the <b>Upload</b> button. The message box will appear and ask "Are you sure you want to upload file?" Click <b>Yes</b>.</p>	 <p>The screenshot shows a file upload form. A note at the top says: 'Note: Please use this form to upload your file to the California Department of Education (CDE).' Below the note are instructions and two steps. Step 1: 'Specify the file you wish to upload to CDE. (Click the 'Browse' button to locate the file)' with three 'Browse...' buttons. Step 2: 'Click on the Upload button to upload the file to CDE.' with 'Upload' and 'Reset' buttons. Arrows point to the 'Browse' and 'Upload' buttons.</p>																								
<p>Click the <b>Logoff</b> button.</p> <p>The data files were successfully submitted to CDE.</p>	 <p>The screenshot shows a successful upload confirmation screen. At the top, it displays 'Selpa ID : 0300' and 'Selpa Name : Amador County SELPA'. Below this is a table of uploaded files. At the bottom, it says 'Your file/files has been successfully uploaded to the California Department of Education. Thank you!' and 'Transferred in 0.063 seconds'. There is a 'Logoff' button at the bottom right with an arrow pointing to it.</p> <table><tr><th>Uploaded File</th><th>Size</th><th>Original Size</th></tr><tr><td>D:\CASEMIS\J04\TestData\AZ.DBF</td><td>211981 bytes</td><td>211981 bytes</td></tr><tr><td>D:\CASEMIS\J04\TestData\BZ.DBF</td><td>793 bytes</td><td>793 bytes</td></tr><tr><td>D:\CASEMIS\J04\TestData\CZ.DBF</td><td>1291 bytes</td><td>1291 bytes</td></tr></table>	Uploaded File	Size	Original Size	D:\CASEMIS\J04\TestData\AZ.DBF	211981 bytes	211981 bytes	D:\CASEMIS\J04\TestData\BZ.DBF	793 bytes	793 bytes	D:\CASEMIS\J04\TestData\CZ.DBF	1291 bytes	1291 bytes												
Uploaded File	Size	Original Size																							
D:\CASEMIS\J04\TestData\AZ.DBF	211981 bytes	211981 bytes																							
D:\CASEMIS\J04\TestData\BZ.DBF	793 bytes	793 bytes																							
D:\CASEMIS\J04\TestData\CZ.DBF	1291 bytes	1291 bytes																							

## Personnel Data Reporting


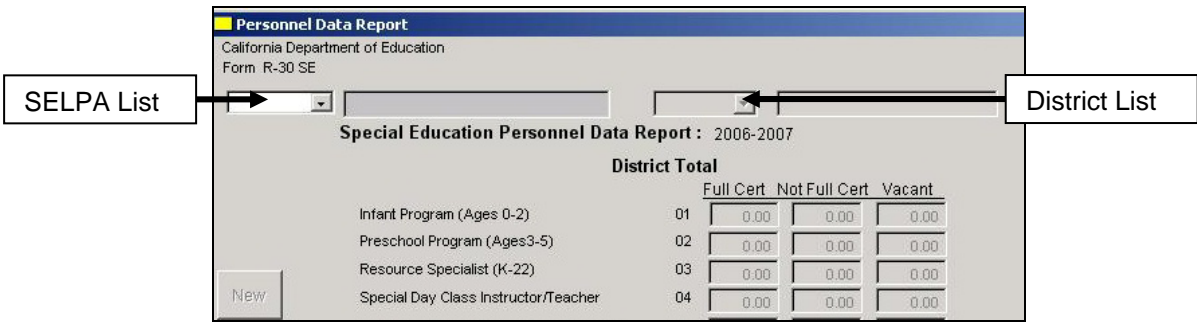

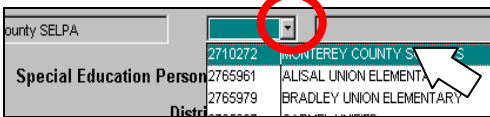
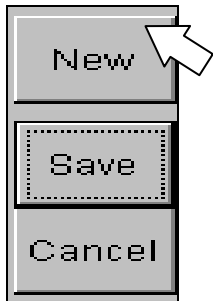
### Personnel Menu Options

**Menu Options** facilitates personnel data reporting for SELPAs and school districts.

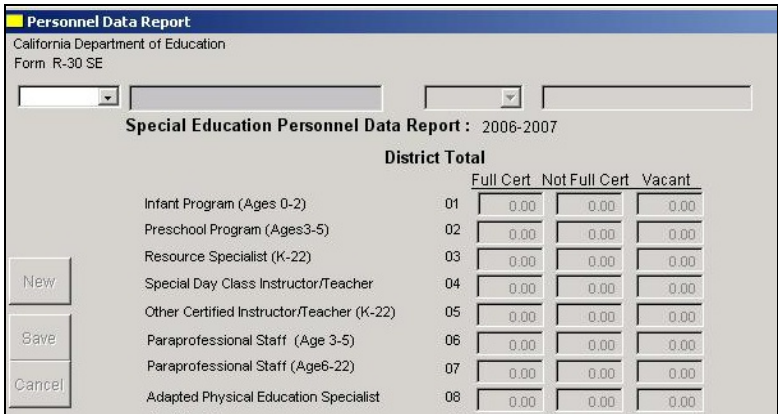
Menu Options - Click the appropriate button located at the left side of the screen. Some buttons are dimmed (grayed out) until certain buttons activate them.



Buttons	Action
	Open up a new data table for data entry screen.
	Store data entered to the default data file (persdata.dbf) in the Personnel folder.
	Clear all data displayed if the onscreen data has not been "Saved"
	Modify the personnel data that has been saved in the default file (persdata.dbf).
	Print and preview all the personnel data report(s) saved in the default file and Personnel Certification Report by SELPA.
	Leave the Personnel Data Reporting.
	Combine another personnel data report file by appending to the default file (persdata.dbf).
	Save a copy of the default file (persdata.dbf) to the user's designation folder and file name.
	Erase the data in the default file to save it as another file in the Personnel folder and clear all data displayed on the screen.

**Note:** Exit, Merge, Export, and Reset options are always available. However, some options are dimmed until a SELPA and district are selected. When a SELPA and a district are selected, the New or Edit and Print option becomes available. The Edit option appears only when data has been saved for the selected district.

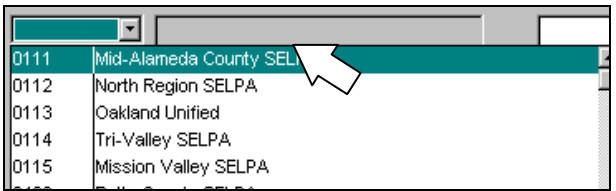
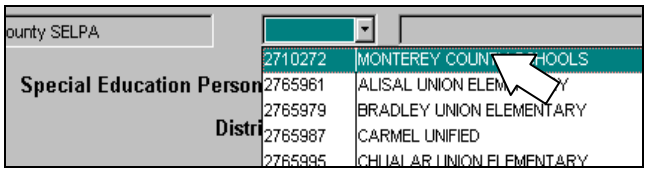
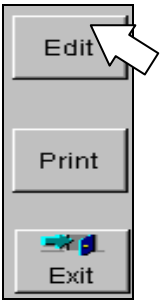
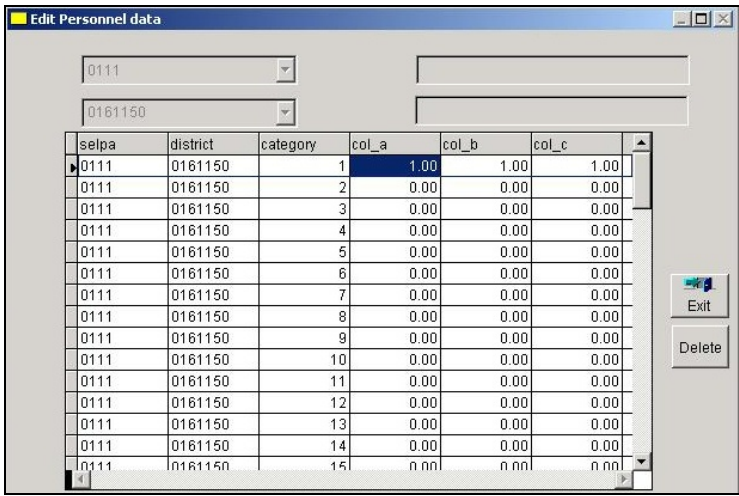

Personnel Reporting Process	
Action	What is on screen
Click on the <b>Personnel</b> button	
<p>The Personnel Data Report Form will appear. Some options are dimmed until the <b>New</b> button is clicked.</p>	
	
Click the <b>SELPA</b> down arrow.	
Select the <b>SELPA</b> from the list.	
Click the <b>District</b> arrow.	
Select the <b>your District</b> from the list. The New button will darken and is an available option.	
<div style="border: 2px solid black; padding: 5px;"> <p><b>SELPA's with SELPA level personnel are to select the SELPA name from the District list. This will create a separate report for these personnel.</b></p> </div>	<p>When a SELPA name is selected for reporting SELPA level personnel a district code of "00000" will display.</p>
Click the <b>New</b> button.	
<div style="border: 2px solid black; padding: 5px;"> <p><b>CAUTION: CASEMIS <u>only</u> allows data reporting for one district at a time. Selecting a SELPA or District after creating the New data report form will cause an abort of the current data. Data on the screen (other than the SELPA or district) may be changed without losing the information.</b></p> </div>	

Multi-district SELPAs must create a new data report for each district with special education personnel. **Select the SELPA, select the District**, create a **new** data report, **enter the data**, and then **save** the data for each reporting district. Repeat this process until all districts with data are entered.


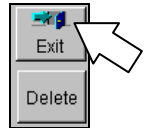
Personnel Data Entries	
Action	What is on screen
<p>Click into the appropriate box(es) to enter data.</p> <p>Column totals automatically at the bottom.</p>	
<p><b>NOTE:</b> A single click will put a cursor line in the box so you can edit the entry. A double click will highlight the entire contents of the box. Pressing the Tab key will move the cursor to the next cell.</p> <p>Districts with erroneous entries can be edited before “Saving” the data. See Edit Personnel Entries for editing data after it has been saved.</p>	

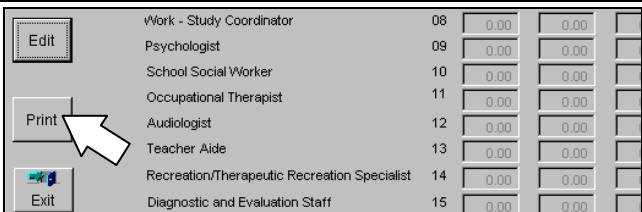

Save or Discard Personnel Entries	
Action	What is on screen
<p>Click the <b>Save</b> button to keep the entries</p> <p><b>Or</b></p> <p>to clear the entries and turn off the data entry screen, choose Cancel.</p>	
<p>Click the <b>OK</b> button after saving the data to close the confirmation screen. All data on the screen will disappear from the current view.</p>	



Edit Personnel Entries	
Action	What is on screen
<p>Click the <b>SELPA</b> down arrow.</p> <p>Select the SELPA from the list.</p>	
<p>Click the <b>District</b> down arrow.</p> <p>Select your District from the list. The New button will darken and is an available option.</p>	
<p>Click the <b>Edit</b> button, to change saved entries or discard <u>all</u> of the selected district's data.</p> <p>Only one district can be edited at a time. To delete the entire district's information refer to the <b>Delete Saved District Data</b> section.</p>	
<p><b>Left click the mouse</b> in the box to be corrected.</p> <p>col_a Highly Qualified col_b Not Highly Qualified col_c Vacant Positions</p> <div style="border: 2px solid black; padding: 5px; margin-top: 10px;"> <p><b>CAUTION: All edits made on this screen are saved automatically. No Cancel option is available to discard changes.</b></p> </div>	
Click the <b>Exit</b> button when done.	



Delete Personnel Saved District Data	
Action	What is on screen
Click the <b>Delete</b> button to discard all the data currently viewed on the Edit screen. (This does not preclude creation of a New Personnel Data report for the district at a later time.)	
Click the <b>Exit</b> button when done deleting the district's data.	

Viewing Personnel Data	
Action	What is on screen
Click the <b>Print</b> button to preview and print the Certification and Personnel report(s).	
<p>Print Preview Toolbar and Individual Tool Usage</p> <p>Toolbar can be moved per Windows protocol.</p> <div data-bbox="912 928 1339 1012" data-label="Image"> </div> <div data-bbox="186 1018 251 1081" data-label="Image"> </div> <div data-bbox="263 1045 734 1081" data-label="Text"> <p>Show the first page of the report.</p> </div> <div data-bbox="186 1087 251 1150" data-label="Image"> </div> <div data-bbox="263 1119 641 1155" data-label="Text"> <p>Move backward one page.</p> </div> <div data-bbox="186 1159 251 1234" data-label="Image"> </div> <div data-bbox="263 1207 1058 1276" data-label="Text"> <p>GO TO PAGE. Type the page number you wish to view. Click the OK button.</p> </div> <div data-bbox="1149 1144 1421 1312" data-label="Image"> </div> <div data-bbox="186 1281 251 1344" data-label="Image"> </div> <div data-bbox="251 1318 695 1354" data-label="Text"> <p>Move forward to the next page.</p> </div> <div data-bbox="186 1354 251 1428" data-label="Image"> </div> <div data-bbox="263 1402 734 1438" data-label="Text"> <p>Show the last page of the report.</p> </div> <div data-bbox="186 1438 321 1501" data-label="Image"> </div> <div data-bbox="332 1470 787 1507" data-label="Text"> <p>Change the magnification level.</p> </div> <div data-bbox="186 1507 251 1575" data-label="Image"> </div> <div data-bbox="263 1543 451 1579" data-label="Text"> <p>Exit preview.</p> </div> <div data-bbox="186 1579 251 1663" data-label="Image"> </div> <div data-bbox="263 1633 500 1669" data-label="Text"> <p>Print the report.</p> </div>	
<p>Click the <b>Print</b> button to print the page(s).</p> <p>Click <b>Exit</b> to leave the Print Preview screens.</p>	

The software generates a Personnel Certification page and a one-page report for each district with entered data.

California Department of Education  
Form R-30 SE (2002-03)  
Certification Page (SELPA)

**SPECIAL EDUCATION PERSONNEL DATA REPORT: 2002-03**  
**SELPA REPORT**

SELPA Code: 0111 SELPA NAME: **MIL-Alameda County SELPA**

ADMINISTRATIVE UNIT:

CONTACT PERSON : TELEPHONE NO.:

**CERTIFICATION:**  
I certify that the personnel data on the enclosed pages for the 2001-02 school year for the above SELPA and the districts within the SELPA have been accurately reported following all applicable laws, regulations, and the instructions provided by the

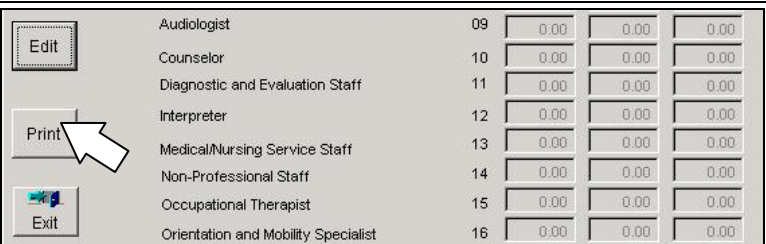
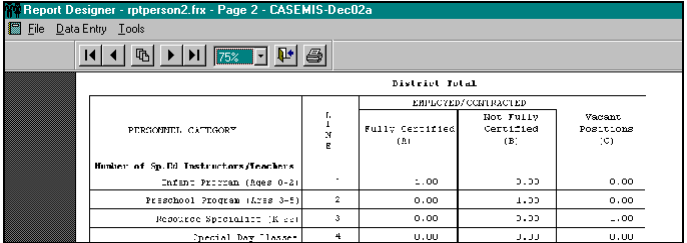
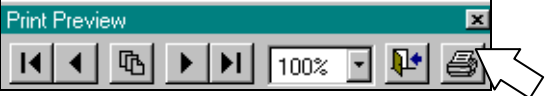

SIGNATURE OF AUTHORIZED OFFICIAL: \_\_\_\_\_  
TITLE OR PERSON: \_\_\_\_\_ DATE: 03/07/03

**IMPORTANT NOTES:**

- The data shall be reported as of DECEMBER 1, 2002.
- All forms are due to the Department of Education by FRIDAY, March 8, 2003.
- Any revision of data must be received by the Department by FRIDAY, March 22, 2003.
- SELPA (not the district) shall deliver all forms of the Department as follows:

PERSONNEL CATEGORY	L I N E	District Total		
		Fully Certified (A)	Not Fully Certified (B)	Vacant Positions (C)
Number of Sp.Ed Instructors/Teachers				
Infant Program (Ages 0-2)	1	1.00	0.00	0.00
Preschool Program (Ages 3-5)	2	0.00	1.00	0.00
Resource Specialist (K-22)	3	0.00	0.00	1.00
Special Day Classes	4	0.00	0.00	0.00
Other Certificated Instructors	5	0.00	0.00	0.00
Other Sp.Ed. Personnel (Preschool-Age 22)				
Vocational Education Specialist	6	2.00	0.00	0.00
Adapted Physical Education	7	0.00	0.00	0.00
Work-Study Coordinator	8	2.00	0.00	0.00
Psychologist	9	0.00	0.00	0.00
School Social Workers	10	0.00	0.00	0.00
Occupational Therapist	11	0.00	0.00	0.00
Audiologist	12	0.00	0.00	0.00
Teacher Aide	13	0.00	0.00	0.00
Recreation/Therapeutic Recreation	14	0.00	0.00	0.00
Diagnostic and Evaluation Staff	15	0.00	0.00	0.00
Physical Therapist	16	0.00	0.00	0.00
Counselor	17	0.00	0.00	0.00
Speech Pathologist	18	0.00	0.00	0.00

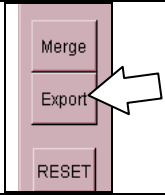
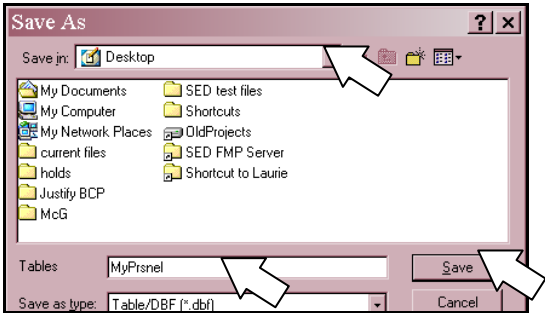
SELPAs are to fax the certification page to (916) 327-3730. **NOTE:** ONLY the SELPA shall send one Personnel certification page for all reporting districts and the SELPA.

Printing the Personnel Data	
Action	What is on screen
Click the <b>Print</b> button to preview the Certification and Personnel report(s).	
Use the navigation buttons to review the entered data.	
Click the <b>Print</b> button to print the Certification and Personnel report(s).	
Click the <b>Exit</b> button when done.	

## Preparing Personnel Data for Submission to SELPA

### Export Personnel Data to a File


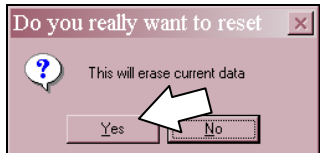
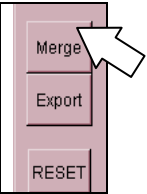
Districts submitting data to SELPA will follow these directions.

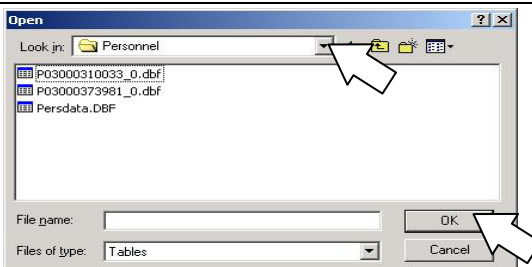


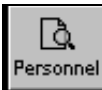

Action	What is on screen
Click the <b>Export</b> button.	
<p>Using the normal Window's conventions, navigate to the location where the data table/file is to be created. Enter the name the <b>Tables</b> box.</p> <p>Click the <b>Save</b> button.</p> <p>Press any key to clear the next message box.</p> <p>Districts who are responsible for entering their data through the CASEMIS software <b>should</b> submit this exported file to their SELPA.</p>	

## Preparing Personnel Data for Submission to CDE

### Merging Personnel District Data to a Single File

This step assists SELPAs to consolidate district data in a merged file.

Action	What is on screen
Click the <b>RESET</b> button.	
Click the <b>Yes</b> button in the message box to erase the current data.	
Click the <b>Merge</b> button.	

Action	What is on screen
<p>Locate the <b>Personnel</b> folder, and then <b>select the district file</b>.</p> <p><b>Click the OK button.</b></p>	
<p>A message box will appear stating the transfer was complete. <b>Press any key</b> to clear the box.</p> <p><b>Click the OK button</b> in the message box</p> <p>Do not exit yet. <b>Repeat this step</b> for each district file submitted.</p>	
<b>Click the Exit button</b>	
<b>Click the Personnel button.</b>	
<b>Click the Print button.</b> Print the data and certification page.	

### Submitting SELPA Personnel Data and Electronic District Data

SELPAs are to print out the Special Education Personnel Data Report SELPA Certification Page. Fill-out, sign and fax it to (916) 327-3730 and email the exported “persdata.dbf” file to [casemis@cde.ca.gov](mailto:casemis@cde.ca.gov).

Please contact your SELPA director for due dates and check for updates on the listserv. Regularly, CDE send updates of SELPA usable file received. Please retain the original Certification Report in the event this was not received by CDE.